



UBS BANKS ON SERENA FOR SOFTWARE CONFIGURATION MANAGEMENT



UBS
Zurich, Switzerland
www.ubs.com

INDUSTRY

Financial Services

PRODUCT

Serena® ChangeMan® ZMF,
Serena® TeamTrack®

APPLICATION

Configuration management,
IT process management

“ChangeMan’s strength is its flexibility. It permits a highly tailored implementation to meet our unique process and technical needs, and can also handle huge volumes.”

— Michael Bailey, associate director of IT, UBS

UBS is a leading global wealth manager, top tier investment banking and securities firm, and one of the largest global asset managers. The company employs over 80,000 people. When UBS Switzerland decided to migrate its core banking applications from a Unisys environment to IBM mainframe hardware, the IT department knew they needed a configuration management system that could handle a massive influx of change to their systems. The company needed a scalable, flexible configuration management solution to effectively manage the migration to the IBM mainframe, control the application lifecycle, and track all changes to meet audit requirements. UBS selected Serena ChangeMan ZMF for its scalable, highly flexible configuration management solution for the mainframe. Serena ChangeMan ZMF has helped UBS to gain control of the software configuration management process, streamline application development, foster confidence in test results, and reduce application processing errors—while handling huge volumes of change. Using Serena ChangeMan ZMF, 485,000 component builds are submitted; 190,000 package promotions are processed; and 800,000 component versions are installed per year.

CHALLENGE

- Hardware migration from Unisys to IBM zSeries mainframe require high volumes of changes in core banking applications
- Need to enforce software development processes and reduce application processing errors
- Need to effectively track changes to meet rigorous audit requirements
- Need to improve confidence in testing results

SOLUTION

- Serena ChangeMan ZMF selected for its scalable, highly flexible configuration management solution for mainframe

RESULTS

- Streamlined application development process and reduced errors
- Unprecedented annual change volume
 - o 485,000 builds submitted
 - o 190,000 promotes executed
 - o 800,000 components installed
- Used by over 2,000 developers across seven global locations

“Serena ChangeMan ZMF has allowed us to standardize and enforce development processes, which makes us much more efficient while providing proper validation and accountability.” — **Michael Bailey, associate director of IT, UBS**

CHALLENGE

When UBS Switzerland decided to migrate from Unisys to the IBM zSeries mainframe, the IT department knew they needed a configuration management system that could handle a massive influx of change requests. “For a company the size of UBS, we knew the volume of changes was going to be enormous for this migration,” says Michael Bailey, Associate Director of IT, UBS. The migration would affect all of the major retail finance and core banking applications used by hundreds of thousands of employees and customers on a daily basis. Beyond the impending migration, UBS faced other challenges that strained the software configuration management process. “In the financial services industry, change is constant,” says Bailey. “There are always new products as well as business applications, which require major software application changes. Additionally, tax regulations are constantly changing, stringent Sarbanes-Oxley and other international regulatory requirements continue to emerge, and mergers and acquisitions are common.”

The company needed a rapidly scalable, flexible configuration management solution to effectively manage the migration to IBM, control component version handoffs through the application lifecycle, and track all changes to meet audit requirements.

SOLUTION

UBS selected Serena ChangeMan ZMF for its scalable, highly flexible configuration management solution for the mainframe. “ChangeMan’s strength is its flexibility. It permits a highly tailored implementation to meet our unique process and technical needs, and can also handle huge volumes. With Serena, we found a solution that seamlessly manages handoffs through the product lifecycle—from development to testing to deployment,” says Bailey.

UBS was also attracted to Serena for the other complimentary products in its portfolio. For example, UBS has also implemented Serena TeamTrack, which allows enterprises to control and automate business processes.

RESULTS

Serena ChangeMan ZMF has enabled UBS to gain control of the software configuration management process, streamline application development, improve confidence in test results, and reduce application processing errors—while handling huge volumes. “Being responsible for the integrity of financial assets and a globally recognized brand makes it absolutely critical to avoid any type of application failure. Our IT department has a great sense of confidence and peace of mind that there’s an established process applied to application code changes because of Serena ChangeMan ZMF,” says Bailey.

UBS manages huge volumes of change with ChangeMan ZMF. In a single calendar year, ChangeMan ZMF processed and managed 480,000 component builds, 190,000 package promotions, and installed over 800,000 component versions to production.

More than two thousand developers in seven global core locations—including Zurich, London, Tokyo, Frankfurt, Hong Kong, Singapore, and Stamford, CT—rely upon ChangeMan ZMF for application development. With Serena, Bailey says IT is delivering high quality applications with very few errors. “Serena has allowed us to standardize and enforce development processes, which makes us much more efficient while providing proper validation and accountability as required by internal and external regulators,” says Bailey.

ABOUT SERENA

Serena Software, Inc. is a global leader in Business Mashups and Application Lifecycle Management (ALM), for distributed and mainframe systems. More than 15,000 organizations around the world, including 96 of the Fortune 100, rely on Serena solutions to automate the application development process and effectively manage their IT portfolio. Serena is headquartered in San Mateo, California, and has offices throughout the U.S., Europe, and Asia Pacific. For more information on Serena solutions and services, visit www.serena.com.

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Learn more about the enterprise-wide power of Serena solutions by visiting www.serena.com or contacting one of our sales representatives in your area.

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